1. Executive CRM Management VA Prompt

Prompt:

Act as an executive-level CRM Management VA for a real estate agent. Your job is to keep the CRM clean, organized, updated, and useful so the agent never loses track of leads, clients, referrals, or follow-up opportunities.

Create a complete CRM management plan using this information:

[PASTE CRM NOTES, LEAD LIST, CLIENT LIST, TAGS, PIPELINE STAGES, FOLLOW-UP TASKS, AND AGENT NOTES]

Organize the CRM into clear contact categories, follow-up priorities, missing information, pipeline stages, notes, reminders, and next actions.

Make the output professional, organized, and easy for the agent to review.

2. CRM Cleanup Prompt

Prompt:

Act as a real estate CRM Management VA. Review this CRM contact list and clean it up:

[PASTE CONTACT LIST, NOTES, TAGS, LEAD SOURCES, AND LAST CONTACT DATES]

Organize the contacts into the correct categories, identify duplicate records, flag missing information, update lead status, recommend proper tags, and create next follow-up actions.

Make the CRM cleaner, easier to search, and more useful for the agent.

3. Lead Categorization Prompt

Prompt:

Act as a real estate CRM Management VA. Review these leads and organize them by priority:

[PASTE LEAD LIST, SOURCE, TIMELINE, NOTES, BUDGET, LOCATION, AND LAST COMMUNICATION]

Sort the leads into hot, warm, cold, nurture, past client, referral partner, active buyer, active seller, and dead lead categories.

Recommend the correct CRM tag, pipeline stage, follow-up date, and next action for each lead.

Keep the output clear, practical, and focused on helping the agent know who to contact first.

4. CRM Follow-Up Plan Prompt

Prompt:

Act as a real estate CRM Management VA. Create a follow-up plan for these contacts:

[PASTE CONTACTS, LEAD TYPE, TIMELINE, LAST TOUCHPOINT, NOTES, AND GOAL]

Create a follow-up plan that includes what message to send, when to follow up, what CRM note to add, what task to create, and what next step the agent should take.

Make the plan professional, organized, and focused on turning contacts into conversations.

5. New Lead Intake Prompt

Prompt:

Act as a real estate CRM Management VA. Create a CRM intake summary for this new lead:

[PASTE LEAD NAME, PHONE, EMAIL, SOURCE, BUYER OR SELLER, LOCATION, BUDGET, TIMELINE, NOTES, AND REQUEST]

Create a clean CRM entry that includes the contact summary, lead type, source, urgency level, suggested tags, pipeline stage, follow-up task, CRM note, and recommended first message.

Make the entry easy for the agent to understand at a glance.

6. Buyer Lead CRM Prompt

Prompt:

Act as a real estate CRM Management VA. Organize this buyer lead inside the CRM:

[PASTE BUYER NAME, CONTACT INFO, DESIRED AREA, PRICE RANGE, PRE-APPROVAL STATUS, TIMELINE, PROPERTY PREFERENCES, SOURCE, AND NOTES]

Create a complete buyer CRM profile with suggested tags, pipeline stage, search criteria, follow-up task, questions the agent should ask, CRM note, and next action.

Make the profile clear, complete, and ready for the agent to use.

7. Seller Lead CRM Prompt

Prompt:

Act as a real estate CRM Management VA. Organize this seller lead inside the CRM:

[PASTE SELLER NAME, CONTACT INFO, PROPERTY ADDRESS, SELLING TIMELINE, MOTIVATION, HOME VALUE NOTES, SOURCE, LAST CONTACT, AND AGENT NOTES]

Create a complete seller CRM profile with suggested tags, pipeline stage, follow-up task, missing information, questions the agent should ask, CRM note, and next action.

Make the profile useful for converting the seller lead into a listing opportunity.

8. Past Client CRM Prompt

Prompt:

Act as a real estate CRM Management VA. Organize these past clients inside the CRM:

[PASTE PAST CLIENT LIST, PURCHASE OR SALE DATE, PROPERTY ADDRESS, CLIENT NOTES, FAMILY DETAILS, REFERRAL HISTORY, AND LAST CONTACT DATE]

Create a past client follow-up plan that includes relationship notes, anniversary reminders, check-in tasks, referral opportunities, suggested tags, and future touchpoints.

Make the plan warm, organized, and focused on long-term relationship building.

9. Referral Partner CRM Prompt

Prompt:

Act as a real estate CRM Management VA. Organize these referral partners inside the CRM:

[PASTE REFERRAL PARTNER LIST, BUSINESS TYPE, CONTACT INFO, RELATIONSHIP NOTES, REFERRALS SENT OR RECEIVED, AND LAST CONTACT DATE]

Create a referral partner CRM plan that includes suggested tags, relationship notes, follow-up tasks, value-add touchpoints, referral tracking, and next actions.

Make the plan professional, relationship-focused, and easy for the agent to maintain.

10. CRM Tagging System Prompt

Prompt:

Act as a real estate CRM Management VA. Create a clean CRM tagging system for a real estate agent.

Use this agent's business focus:

[PASTE MARKET, CLIENT TYPES, LEAD SOURCES, SPECIALTIES, PIPELINE STAGES, AND FOLLOW-UP STYLE]

Create a simple tagging system for buyers, sellers, investors, past clients, referral partners, lead sources, timelines, neighborhoods, price ranges, and follow-up status.

Make the tags easy to understand, consistent, and useful for filtering contacts.

11. CRM Pipeline Setup Prompt

Prompt:

Act as a real estate CRM Management VA. Create a CRM pipeline structure for a real estate agent.

Use this agent's sales process:

[PASTE AGENT SALES PROCESS, LEAD SOURCES, FOLLOW-UP STEPS, ACTIVE CLIENT STAGES, AND CLOSING PROCESS]

Create pipeline stages for new leads, attempted contact, conversation started, appointment set, active buyer, active seller, under contract, closed, nurture, and past client follow-up.

Make the pipeline simple, practical, and easy for the agent and VA to manage daily.

12. CRM Notes Cleanup Prompt

Prompt:

Act as a real estate CRM Management VA. Clean up these messy CRM notes:

[PASTE CRM NOTES]

Rewrite the notes into a clear, professional CRM format that includes contact summary, buyer or seller status, motivation, timeline, budget or price range, preferred location, important details, last conversation, next step, and follow-up date.

Make the notes easy for the agent to understand quickly.

13. Follow-Up Message Prompt

Prompt:

Act as a real estate CRM Management VA. Write a follow-up message for this CRM contact:

[PASTE CONTACT NAME, LEAD TYPE, LAST CONVERSATION, TIMELINE, GOAL, AND NOTES]

Create a short text message, a professional email, and a CRM note for the follow-up.

Make the tone warm, helpful, natural, and not pushy.

14. Lead Re-Engagement Prompt

Prompt:

Act as a real estate CRM Management VA. Create a re-engagement plan for old leads in the CRM:

[PASTE OLD LEAD LIST, LAST CONTACT DATE, LEAD TYPE, ORIGINAL INTEREST, TIMELINE, AND NOTES]

Create a re-engagement message, follow-up schedule, CRM task plan, suggested tags, and recommended next action for each lead.

Make the campaign feel helpful and natural, not spammy.

15. Database Nurture Prompt

Prompt:

Act as a real estate CRM Management VA. Create a nurture plan for the agent's database:

[PASTE DATABASE SIZE, CONTACT TYPES, MARKET, AGENT GOALS, AND CURRENT FOLLOW-UP PROCESS]

Create a simple nurture strategy that keeps the agent visible with buyers, sellers, past clients, homeowners, and referral partners.

Include email ideas, text message ideas, call reminders, monthly touchpoints, client anniversary reminders, birthday reminders, and referral follow-up tasks.

Make the plan practical and easy for a VA to manage.

16. CRM Daily Management Prompt

Prompt:

Act as a real estate CRM Management VA. Create a daily CRM management routine for a real estate agent.

Use this CRM setup:

[PASTE CRM NAME, LEAD SOURCES, PIPELINE STAGES, DAILY TASKS, FOLLOW-UP RULES, AND AGENT PREFERENCES]

Create a daily routine for reviewing new leads, updating contact records, creating follow-up tasks, checking overdue tasks, cleaning notes, tagging contacts, and sending the agent a daily CRM report.

Make the routine organized, repeatable, and easy to follow.

17. CRM Weekly Audit Prompt

Prompt:

Act as a real estate CRM Management VA. Create a weekly CRM audit for a real estate agent.

Use this CRM information:

[PASTE CRM CONTACTS, PIPELINE REPORT, OVERDUE TASKS, DUPLICATES, MISSING INFO, AND FOLLOW-UP ACTIVITY]

Identify CRM issues, overdue follow-ups, stale leads, missing contact information, duplicate records, untagged contacts, pipeline gaps, and opportunities for the agent to contact high-value leads.

Create a simple weekly report with recommended fixes and next steps.

18. CRM Monthly Report Prompt

Prompt:

Act as a real estate CRM Management VA. Create a monthly CRM report for the agent using this information:

[PASTE NEW LEADS, FOLLOW-UPS COMPLETED, APPOINTMENTS SET, CONTACTS UPDATED, LEADS RE-ENGAGED, CLOSED CLIENTS, REFERRALS, AND PIPELINE CHANGES]

Summarize what happened in the CRM this month, what was cleaned up, what follow-ups were completed, what leads need attention, what opportunities exist, and what should be prioritized next month.

Make the report professional, clear, and valuable for the agent.

19. CRM Import Prompt

Prompt:

Act as a real estate CRM Management VA. Prepare this contact list for CRM import:

[PASTE CONTACT LIST OR SPREADSHEET DATA]

Clean and organize the data into proper CRM fields, including first name, last name, phone, email, address, lead type, lead source, tags, pipeline stage, notes, and follow-up date.

Flag duplicates, missing fields, formatting issues, and contacts that need review before import.

Make the file clean, organized, and ready for upload.

20. CRM Migration Prompt

Prompt:

Act as a real estate CRM Management VA. Help organize a CRM migration plan from one system to another.

Current CRM: **[CURRENT CRM]**
New CRM: **[NEW CRM]**

Data being moved: **[CONTACTS, NOTES, TAGS, TASKS, PIPELINES, DEALS, TRANSACTIONS, EMAIL HISTORY]**

Create a migration checklist that includes data cleanup, field mapping, tag organization, duplicate review, export preparation, import preparation, testing, quality check, and post-migration follow-up.

Make the plan careful, organized, and focused on avoiding lost data.

21. CRM Management VA Candidate Test Prompt

Prompt:

You are applying for a CRM Management VA position supporting real estate agents.

Create a complete CRM cleanup and follow-up plan for a real estate agent in Savannah, Georgia.

Use this scenario:

The agent has 500 CRM contacts. Many contacts are missing tags, some leads have not been contacted in over ninety days, there are duplicate records, hot leads are mixed with cold leads, past clients do not have follow-up reminders, and the agent does not know who to call first.

Create the CRM cleanup plan, tagging system, lead priority system, follow-up plan, daily CRM routine, weekly audit report, and risk items to watch.

Make the output professional, organized, practical, and easy for a real estate agent to use.